Installation Guide for

DL Tools for Windows

Release 5.0

U.S. Department of Education

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Introduction

Preface

Direct Loan Tools for Windows (DL Tools) is a multi-year, Windows-based application designed to provide the following functionality related to all Direct Loan schools' software:

- Compare the School Account Statement (SAS) report loan/disbursement data to loans and actual disbursements recorded in EDExpress or an external file and/or compare the SAS report cash data to the DL Tools Cash database.

- Print the SAS in a readable format.

- Track cash receipts (drawdowns) and Returns of Excess Cash (2003-2004) and Refunds of Cash (2004-2005 and 2005-2006) for Direct Loan.

- Rebuild your Direct Loan origination and disbursement records in EDExpress using an automated process.

DL Tools processes data for multiple cycles. Release 5.0 contains Rebuild, Cash Management, and Compare functionalities for the 2003-2004, 2004-2005, and 2005-2006 cycles.

All Direct Loan schools can use the Compare and Cash Management functions. The Rebuild process is provided for schools to rebuild an EDExpress database in the Direct Loan module. Non-EDExpress users can export data from a rebuilt EDExpress database to recreate other needed non-EDExpress loans or databases. For information on exporting from EDExpress to an external system and creating file formats, see Volume III of the *2005-2006 COD Technical Reference*.

DL Tools Features

Imports

You can import the following data files:

- SAS

- Loan Detail External Add

- Disbursement Detail External Add

- Cash Detail External Add

- Rebuild – When selecting the Rebuild import type, you have three options to choose:
    - Compare Only
    - Update All
    - Update Selected Records

Reports

The following reports are available in DL Tools. To print some reports, you must have a connection to the Direct Loan database in EDExpress.

- Internal Ending Cash Balance Report (formerly known as the Cash Report)

- Cash Detail Comparison

- Loan Detail Comparison – Loan Level

- Disbursement Detail Comparison

- SAS Cash Detail

- SAS Loan and Disbursement Detail

- Disbursement Measurement Tool Report

Access 2002

The DL Tools database uses a Microsoft Access 2002 format. Note the following:

- Access 2002 software databases are compatible with all currently supported Microsoft Windows operating systems, which include Windows 98, Windows 2000, Windows Me, and Windows XP.

- You do *not* need any version of Microsoft Access (97, 2000, 2002, or 2003) installed on your PC to use current or future releases of DL Tools.

- You cannot open or view the DL Tools database using a version of Microsoft Access other than Access 2002. Microsoft Access 2002 databases are incompatible with other versions of Access.

- **New for Release 5.0:** The DL Tools database (DLT.mdb) is now password-protected. You will not be able to open, view, or modify your database in Microsoft Access 2002 without this password. This change will not affect your ability to log into DL Tools normally. For more information, see the Help topic "Database Password" in the DL Tools Release 5.0 software.

ED continues to strongly discourage users from viewing or manipulating any EDESuite software database using Microsoft Access. Making changes to the database (using any version of Microsoft Access) can potentially cause damage to the database structure, affect proper software functionality, and limit our ability to assist you with problems you may encounter as a result.

If you choose to open any EDESuite database using Microsoft Access, you should ensure you are opening a copy of the database and not your live, "production" database. You should also ensure you have safe, reliable backups of your EDESuite databases before using Microsoft Access to open live or backup copies of the databases.

Important Installation Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install DL Tools for Windows, Release 5.0. If you are not an Administrator, you will receive a warning when you try to install DL Tools. After an Administrator has installed DL Tools, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

EDconnect

The Student Aid Internet Gateway (SAIG) is the U.S. Department of Education's (ED's) information highway, linking members of the financial aid community with Federal Student Aid (FSA) and the Title IV Application Systems. FSA provides the EDconnect software to make it possible to send and receive data through the SAIG.

You can download the EDconnect software, the *SAIG Desk Reference for EDconnect*, and the *Installation Guide for EDconnect* from ED's Federal Student Aid Download (FSAdownload) Web site located at fsadownload.ed.gov.

Using this Installation Guide

Use the instructions contained in this Installation Guide to install DL Tools for Windows on your PC or local area network (LAN).

In this guide, you will find information on hardware and software requirements, estimating the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

See "Installation Instructions" in this guide for additional instructions.

Installation Instructions

Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing DL Tools on a single-user system.

We provide instructions for network system installations in the "Local Area Network (LAN) Information" section of this installation guide.

Other topics included in this section are:

- Default folder creation with installation

- FSAdownload Web site

- Downloading documentation and software from the FSAdownload Web site

- Installing the software

- Installation log

- Changing the database path for DL Tools

- Uninstalling the software

Folder Creation

The installation process automatically creates the following folder for DL Tools files on your local hard drive:

C:\Program Files\EDESuite\DL Tools for Windows

The installation program assumes that the C drive is your local hard disk, but you can change the drive letter if necessary. In addition, you can use a different name for the folder.

Caution: You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.

FSAdownload Web Site

You can download the DL Tools software in two formats from the FSAdownload Web site located at fsadownload.ed.gov. You can download the entire software in one file, called DLTool5X.exe, where "5X" is the release number (for example, DL Tools Release 5.0's single install file is called DLTool50.exe). Alternatively, you can download the software in separate installments, which you can copy to a network drive, CD, or Zip drive. You cannot use floppy disks because they do not have enough storage space.

See "Downloading Software from the FSAdownload Web Site" in this guide for more details.

Caution: Before you install DL Tools, make sure you close all Windows applications.

Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting documentation from the FSA Web site at fsadownload.ed.gov.	Read "Downloading Documentation from the FSAdownload Web Site" for instructions.
2	Download the software from the FSA Web site at fsadownload.ed.gov.	Read "Downloading Software from the FSAdownload Web Site" for instructions.
3	Install the software.	Read the "Installing the Software on a Single-User System" section for instructions.

Downloading Documentation and Software from the FSAdownload Web Site

You can download FSA software from the Internet on ED's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov. This site also houses FSA documentation such as the DL Tools Cover Letter, and *2005-2006 COD Technical Reference, Volume IV (DL Tools)* for easier and more efficient use of DL Tools.

Sample Download Times

The amount of time it takes to download a file depends on the file size and the speed of the Internet connection. If you do not have a direct connection to the Internet, we recommend a 56 kbps modem.

The table below shows approximate download times for various file sizes and connection speeds. The actual times vary depending on the type and quality of your Internet connection.

Download Speed	1 Megabyte	5 Megabytes	10 Megabytes
33.6 kbps	5 min.	25 min.	51 min.
56 kbps (53 kbps)	3 min.	16 min.	32 min.
768 kbps or higher (typical for cable modems and DSL)	15 sec. or less	1 min., 15 sec or less	2 min., 30 sec or less
1.5 mbps or higher (typical for T1 lines)	7.5 sec. or less	37 sec. or less	1 min., 15 sec. or less

Getting Help

Some organizations block their users from downloading files from the Internet.

- If you are having trouble downloading (for example, if you are prompted for a user ID and password, or nothing happens at all), try again later.

- If you are still unable to download, contact your technical support staff to ensure you have the ability to download files from the Internet.

Downloading Documentation from the FSAdownload Web Site

You can download FSA documentation from the Internet in Adobe PDF (Portable Document Format) format.

The following types of documentation are available to download for DL Tools:

- Cover Letter

- Installation Guide

- *2005-2006 COD Technical Reference, Volume IV (DL Tools)*

Each document description includes the date it was posted, the file size, and gives an approximate download time. However, the length of time it takes to download a document depends on the speed of your Internet connection.

To Download Documentation

1. Go to the address field located at the top of your Web browser's window and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.

2. Click the **Software and Associated Documents** link.

3. Click **Direct Loan Tools Release X** (where X is the release number) to the left of the description. You are taken to the download site.

4. Choose the type of documentation you want to download by clicking the appropriate **PDF Format** link associated with the file.

5. If you would like to save a copy of the document to your system click **File**, **Save As** from the browser menu bar. Select a location on your computer, and then click the **Save** button to save the file. If **Save As** is not available, you can also click the diskette button to select a location to save the file to your computer. The Web site is designed to give the file a default name; however, you can choose another name for the file.

6. After the document is downloaded, go to the saved location and double-click on the file to open and print it.

Downloading Software from the FSAdownload Web Site

We distribute DL Tools and its related documentation through the Internet using the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, fsadownload.ed.gov. The software is available in two formats. You can download the entire program in one file (DLTool5X.exe [where "5X" is the release number]), or in separate installments, which can be copied to a network drive or diskettes.

To Download the Software as One File

1. Go to the address field located at the top of your Web browser's window and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.

2. Click the **Software and Associated Documents** link on the left-hand side of the page.

3. Click the **Direct Loan Tools Release X** (where X is the release number) link. You are taken to the download site.

4. Click the **Full Download** link in the software section to download the program as a single file. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.

5. Select the download location and click **Save**.

   Note: You can save the file to your hard drive, network drive, CD, or Zip drive. You cannot use floppy disks because they do not have enough storage space.

   Note: The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the file is downloaded, go to the saved location and double-click **DLTool5X.exe** (where "5X" is the release number) to extract the file and install DL Tools.

Note: See "Installing the Software on a Single-User System" or "Installing the Software on a Network."

To Download the Software in Separate Installments

1. Go to the address field located at the top of your Web browser's window and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.

2. Click the **Software and Associated Documents** link on the left-hand side of the page.

3. Click the **Direct Loan Tools Release X** (where X is the release number) link. You are taken to the download site.

4. Click the **Disk 1** link in the software section. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk.**

5. Select the download location and click **Save**.

   Note: The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the download of Disk 1 is finished, click **Disk 2**. Save Disk 2 to the same location as Disk 1.

7. Click each succeeding disk until each disk has been saved to the same location on your computer.

8. After the software disk files are downloaded to your computer, go to that location, double-click **disk1.exe**, and unpack it to the same folder where the other disks were downloaded. Disk 1 is a self-extracting zip file. Then double-click **setup.exe** to install the DL Tools software.

Note: See "Installing the Software on a Single-User System" or "Installing the Software on a Network."

Installing the Software on a Single-User System

Downloading the software from fsadownload.ed.gov does not install it. After downloading the software to your computer, you must install it. To install the software on a LAN, see "Installing the Software on a Network" in this guide.

Important Installation Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install DL Tools for Windows, Release 5.0. If you are not an Administrator, you will receive a warning when you try to install DL Tools. After an Administrator has installed DL Tools, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Installation Options

You can install the DL Tools software to a standalone PC using one of two options:

1. **Stand Alone Full.** Use this option when you are installing DL Tools for Windows, Release 5.0, to a single, non-networked computer for the first time

   Important Installation Note: If you want to carry 2003-2004 and 2004-2005 data forward from your DL Tools Release 4.0 database into your Release 5.0 database, do not select the Stand Alone Full installation option. Instead, select Standalone Custom.

   Warning for Subsequent Installations: Use caution when using the Full installation option. This option overwrites your existing DL Tools database (DLT.mdb) and all program files (including DLT.exe), as well as any annotations you may have made to online Help.

2. **Stand Alone Custom.** For DL Tools for Windows, Release 5.0, Stand Alone Custom is the default selection. Use a Stand Alone Custom installation in one of two ways on a single non-networked computer.

   - If you have already installed a full release of DL Tools, you can use the Custom option to add files such as Help files (*.hlp), executable (*.exe) files, or database (*.mdb) files that you did not select when you initially installed the software.

     Caution: Selecting **Database** during a Custom installation will overwrite your existing DL Tools database, including all student data.

   - To upgrade DL Tools (for example, from Release 4.0 to Release 5.0), choose the Custom installation option and select everything except Database (*.mdb). This is the default.

Steps to Install

1. Be sure to close all Windows applications.

2. If you downloaded the DLTool5X.exe (where "5X" is the release number) file from the FSAdownload Web site, go to the location of that downloaded file.

3. Double-click the **DLTool5X.exe** file to start the installation. The file unpacks itself into a temporary folder and continues the installation.

4. DL Tools asks you a series of questions during the installation. The default answer for each question is already selected for you. Under normal circumstances, you should accept the default answer.

   − If the default answer is correct, click **Next** to go to the next installation screen.

   − You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.

   Note: You must click **Yes** if you receive a message asking if you want to overwrite any read-only files when installing the software.

5. Continue this process until you reach the last installation screen, where you click the **Finish** button.

6. When the DL Tools installation process is complete, your Start menu is updated and displays an icon for DL Tools for Windows. However, desktop icons are not created automatically. You are prompted to restart your computer to complete the installation.

Installing Subsequent Releases

When you install an update release of the DL Tools software (for example, Release 5.0 to Release 5.1), which may be posted to resolve software issues, a special process updates the database. The update process occurs the first time the software is initialized after installing the software upgrade. It runs only once, whether on a stand-alone or network database. If there are no updates to the database, this update does not occur.

Note: See "Installation Options" in this installation guide for more information about installing subsequent releases.

Windows Installation Log

When you first install DL Tools Release 5.0, an installation log is created in the Windows directory of the workstation (for example, **C:\Windows**) named **DLTools5x.log**. The DL Tools installation log is updated during each installation and contains a detailed record of all files affected during the installation of the software.

The information tracked in the installation log includes the DL Tools installation directory, the Windows directory, the Windows system directory, whether or not a CD-ROM is available, screen resolution, disk space available, boot drive, install engine, extended memory, and information about files before and after installation. This information can be helpful to users and to CPS/SAIG Technical Support in researching software issues that may occur.

Changing the DL Tools Database Path

You can change the DL Tools database path from within the DL Tools software.

To Change the Database Path

1. Open DL Tools and select **Help**, **System Information**.

2. Click the **Files Information** tab.

3. Click the **Registry** button.

    −   A Registry Viewer application displays with a split view.

    −   In the left frame, you see a tree-style view, and in the right frame, you see a list-style view with two fields: Name and Value.

    −   Select **Direct Loan Tool** under Year56.
        If you do not see the "Year56" label in the left frame:
        *   Left-click the + (plus sign) next to EDESuite.

        *   You will see a label indicating the software's year cycle under EDESuite.

        If you do not see the "Express" label in the left frame:

        *   Left-click the + (plus sign) next to Year56.

        *   You will see a label indicating the software's name.

        *   Highlight the name of the software.

4. On the right frame of the split window, find **Database** under the Name field, click it, and select **Edit**, **Edit** from the menu bar.

    −   A New Registry Value dialog box appears with two edit boxes.

    −   One box is labeled "Name" (which is disabled), and the other box is labeled "Value."

5. Enter your **new database path** in the box next to Value. Include the full path and database name (DLT.mdb) exactly as it appears in Windows Explorer, with uppercase and lowercase letters.

6. Press **Enter** or click **OK**.

7. A message appears indicating that the registry value is saved. Click **OK**.

8. Exit the Registry Viewer by going to **File**, **Exit**.

9. Click **OK** to exit the System Information dialog box.

10. **Exit** the DL Tools software.

The next time you start DL Tools, you will connect to the database using the new database path. You can confirm your connection to the new database by viewing the current database name and location in the status bar on the bottom of the main DL Tools window.

Uninstall

To uninstall DL Tools, click **Start**, **Programs** from your Windows desktop and select **EDESuite** to see an icon for the **DLTools for Windows Uninstall** utility.

Warning: If you are running DL Tools on a stand-alone PC, the Uninstall process deletes your current DL Tools database, all executable files, and all Dynamic Link Library (DLL) files, as well as icons created during the installation of the DL Tools software from the Start menu and the software's program group. Do not run the Uninstall process unless you are absolutely sure you want to delete these files from your PC.

If your DL Tools database is installed on a LAN, running the Uninstall utility deletes all DL Tools files and icons from your workstation, but does not delete the DL Tools database on your network.

To Uninstall DL Tools

1. Click the **DLTools for Windows Uninstall** icon. A prompt asks if you are sure that you want to completely remove the application and all of its components.

2. Click the **Yes** button.

3. Click **OK**.

DL Tools may also ask you additional questions during the Uninstall process. Click either **Yes** or **No** as appropriate in response to these questions.

Warning: Do *not* uninstall the DL Tools software before performing a Custom installation.

Getting Started

Logging In for the First Time

The first time you start DL Tools, the Startup Information dialog box appears. Before you can use DL Tools, you must enter the default user ID and password, create a new password, define your default Direct Loan School Code and other settings used by DL Tools.

User ID and Password

Each time you start DL Tools, you must enter a valid user ID and password.

For system security, DL Tools requires a unique user ID and password for each user.

To access DL Tools for the first time and establish your new password:

1. Type in the default user ID, **SYSADMIN**.

2. Type in the default password, **SYSADMIN**.

3. Type a **new password** in the New Password box. You must change the default password by typing a new one in this field.

   – You can enter up to eight alphanumeric characters.

4. Type the **new password** again in the Verify Password field.

   – The New Password and Verify Password must be the same.

5. Click **OK** to log in.

Note: The SYSADMIN user ID should be reserved for system administrator functions. All users should have a unique user ID and password for logging into DL Tools.

Refer to the topic "Security Users dialog box" in online Help for information on setting up user IDs and passwords for your staff.

After you enter your new password, define your default Direct Loan School Code and other software settings in **Tools, System Setup**. See the topic "System Setup dialog box" in online Help for more information.

Resetting Your User ID and Password

If you have forgotten your password, your DL Tools administrator can use the Security Users function to give you a new one.

To Access the Security Users Function

1. Select **Tools** from the menu bar.

2. Select **Setup**, **Security Users**.

If you are the DL Tools administrator and you have forgotten your password, call CPS/SAIG Technical Support for help with resetting the password for the default SYSADMIN user ID.

All DL Tools users, especially DL Tools administrators, should record their user IDs and passwords and keep them in a safe place.

System Requirements

Hardware and Software Requirements

The Student Assistance General Provisions regulations in 34 CFR 668.16(o) provide, in part, that to be administratively capable an institution must participate in electronic processes designated by the Secretary. These processes were first identified in a notice published in the *Federal Register* on September 19, 1997. In that Notice, we also provided information regarding the hardware and software requirements needed for an institution to participate in the designated electronic processes.

Because of advances in technology we updated the hardware and software requirements in the *Federal Register* Notice published on December 22, 2000 and, most recently, in the *Federal Register* Notice published in September 2004.

The September 2004 notice updates the designated electronic processes that institutions must participate in and the software and hardware requirements (presented as a minimum system configuration and an optimal system configuration) that institutions should meet to participate in these processes. The full September 2004 notice is available on the IFAP Web site at ifap.ed.gov/fregisters/FR09142004.html. Additional details and frequently asked questions (FAQs) regarding the new requirements are also available on IFAP at ifap.ed.gov/dpcletters/GEN0408.html.

The following minimum and optimal hardware and software configurations are required for DL Tools for Windows Release 5.0 users, per the September 2004 notice:

	Minimum Configuration	Optimal Configuration
IBM or Fully IBM-compatible PC	1.2 GHz Processor	2.8 GHz/333 MHz PC
	512 MB RAM	1 GB RAM
	60 GB Hard Drive	80 GB Hard Drive
	48x CD-ROM Drive (CD-RW recommended)	48x CD-ROM Drive (CD-RW recommended)
	Windows-compatible keyboard and mouse	Windows-compatible keyboard and mouse
Monitor and Video Card	Capable of SVGA (Super Video Graphics Video Graphics Adapter) resolution, 800 x resolution (800 x 600) or higher	Capable of SVGA (Super Video Graphics Video Graphics Adapter) resolution, 800 x resolution (800 x 600) or higher
Internet Connection*	56 Kbps modem (meets High-speed Internet or is upgradeable connection [for example, to V.90 standard])	High-speed Internet or is upgradeable connection (for example, to V.90 standard or DSL).
Printer	Laser printer capable of printing on standard paper (8.5" x 11")	Laser printer capable of printing on standard paper (8.5" x 11")
Operating System	Windows 2000 or Windows XP Professional recommended (FSA will support Windows 98/98SE/ME only until June 30, 2006).	Windows 2000 or Windows XP Professional recommended (FSA will support Windows 98/98SE/ME only until June 30, 2006).

*A connection to the Internet is necessary to access the Information for Financial Aid Professionals (IFAP) Web site located at ifap.ed.gov, and the FSAdownload Web site located at fsadownload.ed.gov. While we include "high-speed Internet connection" only in the Optimal Configuration, we encourage institutions to consider moving away from a dial-up connection if they intend to submit or receive large amounts of data. This will significantly reduce transmission time and will increase the probability of an uninterrupted transmission session.

The determination of which updated system configuration requirements to follow should be based on the number of Extensible Markup Language (XML) transactions your school will process. Pell and Direct Loan origination and disbursement data is exported from EDExpress in the Common Origination and Disbursement (COD) Common Record format, which follows an XML schema (record layout).

Although all of the electronic processes included in the notice can be performed using the minimum configuration, we strongly recommend the optimal configuration if your school will send (transmit) and receive 4,000 or more records in an XML document (batch). We make this recommendation because XML file formats require greater storage and computing power.

You should also have the following hardware and software:

- Windows-compatible keyboard (for example, IBM enhanced 101 or 102 keyboard)

- Microsoft-compatible mouse

- Microsoft Internet Explorer version 5.5 or higher

LAN Hardware and Software Recommendations

In addition to the configuration recommendations outlined in the "Hardware and Software Requirements" section, the following hardware and software components are recommended for running DL Tools in a LAN environment:

- Network Operating System: Novell NetWare versions 3.12 or above or 4.11 or above, Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2003 server

   Note: Novell NetWare versions 3.12 and 4.11 are separate products.

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports

Refer to "Systems Requirements" for a complete listing of the general hardware and software required for DL Tools.

Recommended Items to Consider

We strongly encourage you to use the following additional tools to assist you in managing and protecting your financial aid data:

- Backup system (for example, a Zip drive) to store your data (we recommend that you test your backup data regularly to make sure it's working)

- Power supply backup or surge protectors

- Phone line surge protector

- Virus scan software

Estimating Hard Disk Space

The following information gives you an estimate of how much hard disk space is required for each ED software product and for certain types of records.

To find out the approximate total space required, add the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 ISIR, National Student Loan Data System (NSLDS), Packaging, Pell, and Direct Loan records using all of the software products listed is approximately 119 MB.

Each software product requires the following space:

Product	Size
EDExpress for Windows	16 MB
EDconnect for Windows	15 MB
DL Tools for Windows	5 MB
Student Status Confirmation Reporting (SSCR) with 300 records	6 MB

Each set of 5,000 records requires the following space:

Record	Size
ISIR	16 MB
NSLDS	7 MB
Packaging	3 MB*
Pell	2 MB**
Direct Loan	49 MB***

   *   Includes only ISIR data imported into Packaging, for example, no budgets added, no records packaged, etc.
  **   Includes two anticipated disbursements per origination record
*** Includes origination records only; no disbursements

Local Area Network (LAN) Information

Installing the Software on a Network

Installation Options

You can install the DL Tools software to a LAN using one of three options:

1. **Network Server**. Use this option *only* when you are installing DL Tools for Windows to a network for the first time. The Network Server option only installs the DL Tools database to a network location. It does not install the DL Tools program files.

   Important Installation Note: If you want to upgrade from Release 4.0 to Release 5.0 and carry your 2003-2004 and 2004-2005 data forward into your Release 5.0 database, do not select the Network Server option. Instead, only perform Workstation Full installations on all new PCs or Workstation Custom installations on PCs that currently have Release 4.0 installed.

   Warning for Subsequent Installations: Use caution when using the Network Server installation option. If you already have a DL Tools database (DLT.mdb), the Network Server option will overwrite it and you will lose all existing student data.

2. **Workstation Full**. Use this option when you are installing DL Tools for Windows Release 5.0 for the first time or if you are upgrading from DL Tools Release 4.0 to Release 5.0 on a workstation that will be used to access a network copy of the database.

3. **Workstation Custom**. Use this option to install components of the DL Tools software to a workstation that will be used to access a server-based copy of the database. If you have already performed a Workstation Full installation of DL Tools, you can also use the Custom option to add the Help files (*.hlp) if you did not install them the first time. The Workstation Custom option leaves all other database and system settings intact.

    - You can also choose the Workstation Custom installation option to upgrade DL Tools from Release 4.0 to Release 5.0 for the first time. The Workstation Custom installation option functions identically to a Workstation Full installation, with the exception that you can include or exclude the Help files from your installation.

The database will be updated with the DL Tools Release 5.0 changes the first time you access the Release 5.0 software following completion of all of your Workstation Full/Custom installations. You will no longer be able to access data in this database using DL Tools Release 4.0 after this.

Important Back-up Note: You will not be able to access 2002-2003 data in your DL Tools database after you upgrade from Release 4.0 to Release 5.0. We strongly recommend you create a back-up copy of your Release 4.0 database (DLT.mdb) before upgrading to Release 5.0, in the event that you need to access your 2002-2003 data using an earlier version of DL Tools on another PC.

Important Installation Note: If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install DL Tools for Windows 2005-2006, Release 5.0. If you are not an Administrator, you will receive a warning when you try to install DL Tools. After an Administrator has installed DL Tools, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Installation Instructions

Follow the instructions in this section for installing the DL Tools software on a network. For example:

- If you are installing DL Tools for the first time, perform a full installation and follow the steps provided in "First Time Network Installation."

- If you are installing DL Tools after you have created data in the database, follow the instructions provided in "Subsequent Network Installation."

Important Back-up Note: You will not be able to access 2002-2003 data in your DL Tools database after you upgrade from Release 4.0 to Release 5.0. We strongly recommend you create a back-up copy of your Release 4.0 database (DLT.mdb) before upgrading to Release 5.0, in the event that you need to access your 2002-2003 data using an earlier version of DL Tools on another PC.

When you perform a workstation installation, the executable file for DL Tools (DLT.exe) and all other program files are installed to the workstation's local hard drive. Do *not* install the program files to your server.

The installation modifies all DL Tools program group icons on your Windows Start Menu folder to point to the executable file on your local hard drive.

Installing DLT.exe to the workstation's hard drive rather than the network file server improves the speed and performance of the software because DL Tools uses the combined resources of the workstation and the file server instead of those of the file server alone.

Follow the instructions on the next page to install DL Tools to a LAN.

Note: The DL Tools software can be installed in Safe Mode, if necessary, but it cannot be run in Safe Mode.

Note: Be sure that all Windows applications are closed before you proceed with this setup.

First Time Network Installation

To Install the Software on a Network for the First Time

1. First, select the **Network Server** installation option to install only the DL Tools for Windows database (DLT.mdb) on the file server, not the DL Tools program files.

2. Enter the network server location where you want to install the DL Tools for Windows database. You can type the path or click the **Browse** button.

3. Follow the prompts provided by the setup program.

4. Second, perform a **Workstation Full** installation on *all* workstations that will access the server-based copy of the database for this release of DL Tools. The Workstation Full option installs all program files, including the executable file (DLT.exe) to your local hard drive.

   Note: The Workstation Full installation option prompts you for the location of the database installed during the Network Server installation (step 2). Be sure you know the location of the database on your network before installing DL Tools.

Additional Instructions

You are asked two location questions during a **Network Workstation** installation:

- The software first prompts you to enter the location of the database on the server. This question is asking where your database is located, not where you want the software installed.

- After the software has located the database, the software asks you where you want to install the program files. Your response should be the default location, **C:\Program Files\EDESuite\DL Tools for Windows**, or another local designation.

Subsequent Network Installation

To Install Release 5.0 on a Network Where Release 4.0 Is Already Installed

1. Do *not* use the **Network Server** installation option for a subsequent network installation of DL Tools. The **Network Server** installation option is only for users installing DL Tools for Windows Release 5.0 to a network file server for the first time. Choosing this installation option installs an empty DL Tools database file (DLT.mdb) on the network file server, overwriting your existing database.

   If you select the **Network Server** installation option for a subsequent network installation of the DL Tools software, the installation program alerts you that the DL Tools for Windows Release 5.0 database has already been installed in the specified directory. Select **OK** to return to setup and choose a different installation option.

   You should create a reliable, functioning backup version of your existing DL Tools Release 4.0 database (DLT.mdb) before upgrading to Release 5.0. You will not be able to access 2002-2003 data in your Release 4.0 database following the upgrade process.

2. Click the **Workstation Custom** installation option.

3. When prompted, select the components you want to install.

4. When prompted for the location of your DL Tools for Windows database (DLT.mdb), provide the location of your Release 4.0 database (if upgrading from Release 4.0 to Release 5.0) or your existing Release 5.0 database (if installing a Release 5.X upgrade version). Follow this and other prompts provided by the setup program to run the installation.

If this is a first-time upgrade to DL Tools Release 5.0 or the installation of a subsequent Release 5.X upgrade version, the database is upgraded after all workstation installations are complete. The upgrade occurs when a user accesses the software for the first time. Subsequent installations may or may not update the database, depending on the nature of the release and the issues or enhancements being added.

   Note: All workstations should be upgraded with the latest release before you open the DL Tools software to run the database update. If you fail to do this, any workstation not updated receives a database mismatch error message if a user tries to run DL Tools.

Note: If you are adding a workstation to your network environment, perform a **Workstation Full** installation of the current release of DL Tools for that workstation.

To Install Subsequent and Future Releases

For all future releases of DL Tools for Windows Release 5.X, you must do a **Workstation Custom** installation to ensure the database structure is updated but not overwritten. Follow the instructions in "Subsequent Network Installation" for more information.

Note: Some DL Tools service releases only update program files on your workstations, and do not perform any updates to your database. Refer to the electronic announcement and other documentation posted for a given DL Tools releases for more information on the installation process that should be performed.

Instructions for Schools with Diskette Directories on a Server

To Install the Software Using "Disk" Files

If you want to copy the installation "disk" files to a file server so you can perform workstation installations from the server, use the following steps:

1. Create an overall "Install" folder, then create subdirectory "disk" folders for each diskette folder downloaded from the FSAdownload Web site. For example, if you need to download six diskette installation files, then create the overall directory and six subdirectories on the file server as displayed below:

   \Install

   \Install\DISK1

   \Install\DISK2

   \Install\DISK3

   \Install\DISK4

   \Install\DISK5

   \Install\DISK6

   Note: The parent folder can have any name, but the subdirectories must be named DISK1, DISK2, etc.

2. Copy the contents of each disk into its corresponding folder on the server.

3. You can now install DL Tools from the file server by running **setup.exe** from the DISK1 folder on the server instead of carrying the CD or Zip drive to each workstation.

LAN Server Compatibility

DL Tools can be used as single-user or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x, 4.x, and 5.x

- Windows 2000 Server

- Windows 2000 Advanced Server

- Windows 2003 Server

Caution: You should not run the DL Tools software on peer-to-peer networks such as Artisoft LANtastic, Microsoft Windows for Workgroups, or Novell's Personal NetWare.

According to the Microsoft Knowledge Base, some anomalies have been known to occur when using Microsoft Access with the following networks:

- DEC Pathworks

- IBM LAN Server

- Sun PC-NFS

Since DL Tools makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with DL Tools.

LAN Cautions

When multiple users are concurrently updating the databases in the DL Tools software, the student records being modified are locked. In addition, certain functions are locked when concurrent access would degrade the system or disrupt a process.

Examples include:

- The database is locked when the executing function is mass loading records, such as the Import function. For example, concurrent users will not be able to import a Cash Detail External Add file while cash records are being manually entered.

- When performing a Rebuild on an EDExpress database using DL Tools, the student records in EDExpress being recreated will be locked until the Rebuild process is complete.

- Records are locked when an executing function needs stable data for updating or printing.

LAN Messages

Novell

These messages notify users when a locking situation occurs:

LAN Error Message

Condition

<Database> is locked and cannot be accessed at this time.

If the database remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

Record in use - Retry later.

If the record remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

Function in use - Retry later.

If the function remains locked after five seconds of continual attempts, you are returned to the menu bar.

Windows 2000 or XP

If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install DL Tools. If you are not an Administrator, the installation program warns you that you do not have sufficient rights to install the software. After an Administrator has installed DL Tools, you can run DL Tools for Windows as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues.

For more information, visit microsoft.com and search for "file protection" to view Microsoft articles explaining the technical details of Windows 2000/XP file protection.

Additional LAN Instructions

If you are using a Novell NetWare product, enter the following commands from the NetWare Server Console prompt:

Set Maximum Record Locks Per Connection = 10000

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

Getting Help

Basics

To get help with the installation of DL Tools:

- Review installation instructions.

- Become familiar with your PC.

- Contact your system administrator.

- Use DL Tools online Help.

- Contact Technical Support.

- Review Sources of Assistance for Schools.

These approaches are described in the succeeding sections.

Review Installation Instructions

If you have problems installing DL Tools, first review the installation instructions again.

Try repeating the installation process (make sure you include all steps).

If you are still having difficulty, contact CPS/SAIG Technical Support.

Become Familiar with Your PC

After you have successfully completed the DL Tools installation, click **System Information** from the Help menu.

Compare this information to the required configuration listed at the beginning of this section. You may need to upgrade your equipment or your system's configuration.

Contact Your System Administrator

Your school or organization may have additional instructions for your PC. For example, you may get an error if you are trying to install the DL Tools software to a drive for which you do not have access.

Use DL Tools Online Help

Instead of a paper user's guide, DL Tools has online Help.

General help is available from the menu bar, and field help is available by pressing the **F1** key.

See the topic "Using Help" in the online Help for more information.

You can access online Help by using any of the following methods:

- From the **Help** menu, choose a Help command.

- Choose the **Help** button available in most dialog boxes.

- Use the keyboard to select an item from a menu, and then press **F1** to see a description of the item.

- Select a dialog box option or command and then press **F1,** or click the **Help** button to move directly to an explanation of the option.

- Use the **Context Help** toolbar button to obtain help on menu options and other toolbars.

Technical Support

Contact FSA Technical Support

FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's FSA systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, visit the FSA Schools Portal Listservs & Mailing Lists:

ed.gov/offices/FSA/services/fsatechsubscribe.html

For FSA technical support, post an e-mail (including your TG number and all pertinent contact information) with your question. You will receive a response from FSA staff or the financial aid partner responsible for the system that you have a question about.

Note: You must subscribe to FSATECH to send and receive messages from the list.

CPS/SAIG Technical Support

CPS/SAIG Technical Support can assist you with any questions regarding:

- Technical assistance

- Software functionality

- ISIR/custom file layouts

- EDconnect functionality

Call CPS/SAIG Technical Support at:

800/330-5947

TDD/TYY: 800/511-5806

or e-mail your inquiries to CPS/SAIG Technical Support at:

CPSSAIG@ed.gov

See the topic "CPS/SAIG Technical Support" in the online Help for more information.

Representatives are available to assist you between 7 a.m. and 7 p.m. (CT), Monday through Friday, excluding holidays.

Guidelines for Calling Technical Support

When you call CPS/SAIG Technical Support, you must be at your PC and prepared to provide the following information:

- Your TG ID (TG followed by a five-digit number).

- The release of the software you are using (under Help/About DL Tools for Windows).

- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, and type of memory management being used).

- The exact wording of any error messages you received, as they appeared on your screen.

- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.

- A description of any resolution steps you took before calling.

CPS/SAIG Voice Response System

The CPS/SAIG Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to enter:

- **1** for an English-speaking operator

- **2** for a Spanish-speaking operator

Review Sources of Assistance for Schools

Sources of Assistance for Schools is a document that contains helpful contact information for all FSA programs, including frequently used help lines, e-mail addresses, and Web sites. You can download the *Sources of Assistance for Schools* from the FSAdownload Web site located at fsadownload.ed.gov.